**Agency Checklist for ERA 2.0 Launch**

## Log On

- ☐ Obtain OMB Max Account
- ☐ Navigate to ERA 2.0 Login Page
- ☐ See *ERA 2.0 Job Aid: Access System & Log In*

## Verify ERA 2.0 Roles

- ☐ Once you have logged into the system you can verify your account roles by selecting your name in the upper right corner of the screen. You should see your assigned roles.

## Transfer Requests

You may now edit existing or create new Transfer Requests and submit them to NARA for review. See the ERA 2.0 Training Support Materials and ERA 2.0 Agency User Manual

- ☐ *ERA 2.0 Job Aid: Create a Transfer Request*
- ☐ *ERA 2.0 Job Aid: Propose a Transfer Request*
- ☐ Adding Legacy Schedules to ERA 2.0
- ☐ ERA Base Legacy Records Schedules Crosswalk
- ☐ Accessioning Electronic Records Webpage
- ☐ NOTE: If you encounter any unexpected issues with Transfer Requests please review the *ERA 2.0 Agency Troubleshooting Guide*. If the issue is still unresolved contact your accessioning archivist.

## Create New Records Schedules

You may now edit existing or create new Records Schedules and submit them to NARA for review. See the ERA 2.0 Training Support Materials and ERA 2.0 Agency User Manual

- ☐ *ERA 2.0 Job Aid: Create a Records Schedule*
- ☐ *ERA 2.0 Job Aid: Certify a Records Schedule*
- ☐ NOTE: If you encounter any unexpected issues with records schedules please review the *ERA 2.0 Agency Troubleshooting Guide*. If the issue is still unresolved contact your appraisal archivist.

**Records Schedules Created Pre-ERA 2.0**

Records schedules created prior to ERA 2.0 that have not been approved require additional action. Appraisal archivists must return the schedule for revision. Agency users must then reassign the schedule, complete new required fields, and certify the schedule back to NARA.

- ☐ **Reassign Record Schedules -** Certifying Officials must reassign pending and draft schedules to a user. This is a one-time clean up that can be done using the following procedures:
  - ☐ Check both the "Unassigned Tasks" and "My Team's Tasks" for Drafts and Pending schedules
  - ☐ For each schedule, select the vertical ellipses and then select "reassign"
  - ☐ Select a user from the dropdown
  - ☐ Select the "Confirm" button. Schedule will be reassigned to that user

- ☐ **Complete new required fields for each records schedule item.** See *ERA 2.0 Job Aid: Create and Edit Items*
  - ☐ General Information section:
    - ☐ Is this item a Big Bucket?
  - ☐ Permanent Items: Additional Information section
    - ☐ Are any records by this item subject to a FOIA exemption? If yes, select from dropdown
    - ☐ Update Additional Information:
      - ☐ Records Format
      - ☐ Volume
    - ☐ Confirm frequency of transfer is correct
  - ☐ Temporary Items: Additional Information section
    - ☐ Are any of the records covered by this item national security classified?

- ☐ **Make any additional revisions to the schedule as necessary**

- ☐ **Certify revised schedule to NARA**
  - ☐ Records Schedulers see *ERA 2.0 Job Aid: Submit for Certification:*
  - ☐ Certifying Officials see *ERA 2.0 Job Aid: Certify a Records Schedule*

**Additional Training Material**

- ☐ ERA 2.0 Training Support Materials
- ☐ ERA 2.0 Agency Guides